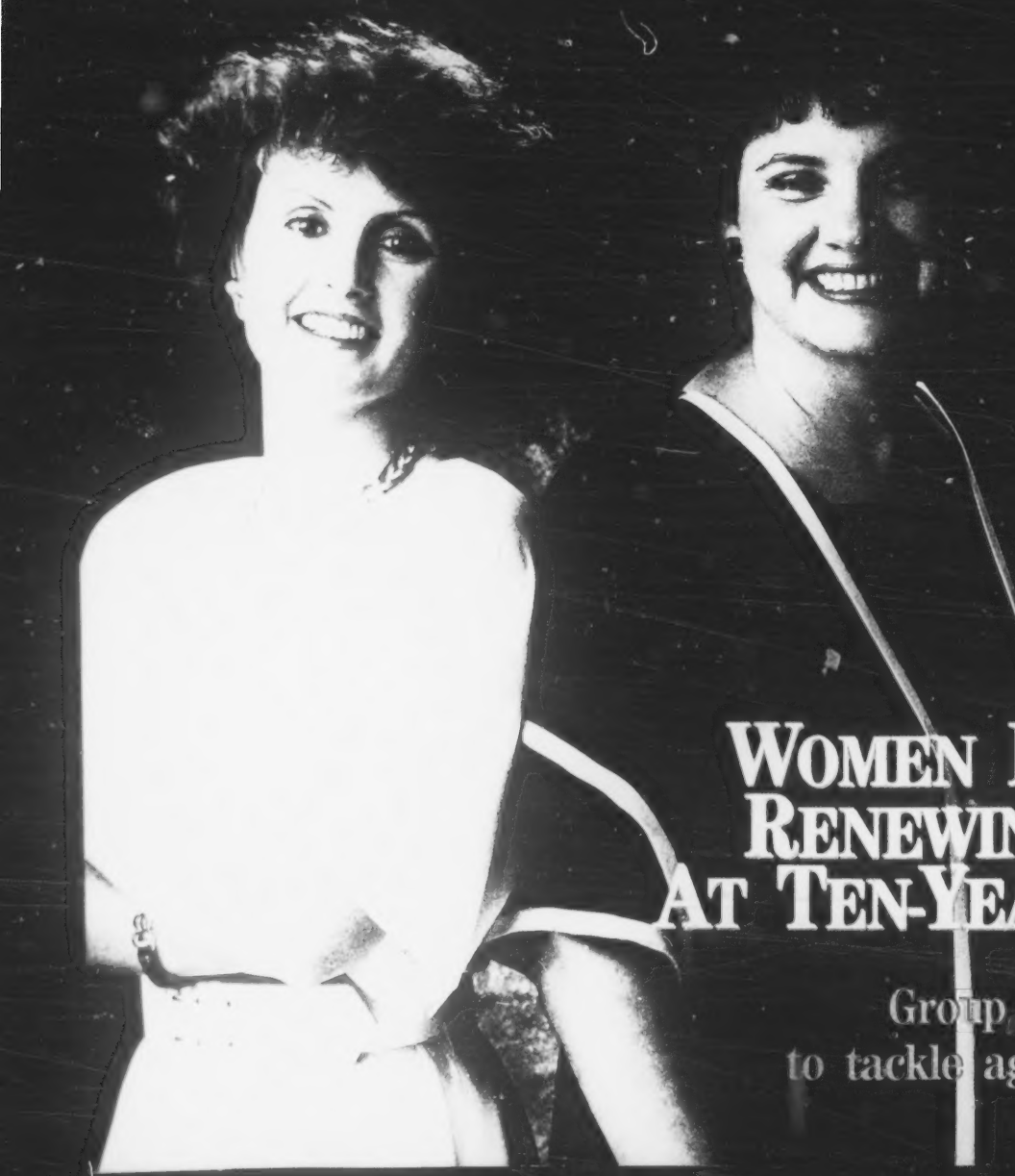
CableVision

INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT

JULY 17, 1989



DIGITAL AUDIO: SO FAR, SO GOOD

MARKETING CO-OPS STRETCH AD DOLLARS

MULTIPORT EASES CONSUMER INTERFACE

NEW HURDLES SEEN IN TIME INC. DEALING

WOMEN IN CABLE RENEWING VISION AT TEN-YEAR MARK

Group sees new ways to tackle age-old problems

CableVision

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Photo by Charlie Akers

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Women in, and for, cable

At its 10-year mark, Women In Cable has achieved more than many expected

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City buyout clauses in some Time and Warner franchises raise problems

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ABP BPA

The CABLE POLL

Midwest CATV & CableVision Magazine

Most operators offering pay-per-view satisfied with financial performance

While only 28 percent of cable systems offer a pay-per-view service, 61 percent of those that do say it has met or exceeded their financial expectations, according to data from The Cable Poll™.

The PPV industry, while steadily growing, continues to be largely a large-system undertaking. A majority—56 percent—of those systems with more than 50,000 subscribers offer a pay-per-view service, a figure that declines in proportion to the size of the system, shrinking to 12 percent of systems with fewer than 10,000 subs. Similarly, the financial payback of pay-per-view increases according to the size of the system, the data indicate. Eighty-eight percent of those systems with more than 50,000 subs offering pay-per-view say the service met or exceeded their expectations.

Technological limitations continue to be the biggest barrier to the growth of the pay-per-view industry. Asked why their systems did not offer a pay-per-view service, 39 percent of Cable Poll™ respondents cited technical reasons. And many operators apparently continue to believe that PPV is not a real money-maker, with 23 percent of respondents saying they do not feel it would be profitable in their market. Nineteen percent said the hardware is too expensive.

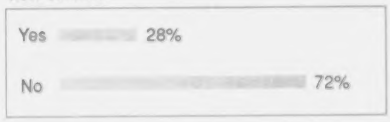
Number 8 in a series of ten

While pay-per-view vendors lately have been offering various kinds of special events, such as rock concerts and stock car races, operators continue to believe that movies and sporting events sell best in the markets. Among those surveyed, 35 percent said movies sell best while 64 percent thought sporting events draw the highest buy rates.

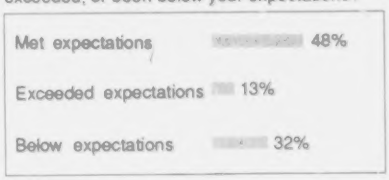
Looking ahead to the proposed offering of some 1992 Olympic events on pay-per-view, operators apparently are leaning toward the undertaking. Thirty-four percent of those polled said they plan to carry the Olympics on pay-per-view and only 21 percent said they would not. Forty-five percent said they are undecided as to their plans, figures that remain fairly constant across the range of system sizes.

The Cable Poll™ is a sampling of industry opinion conducted on a regular basis by Ryan/Samples Research Inc. for Midwest CATV and *CableVision* magazine. Telephone interviews for this edition of the poll were conducted March 13-23; a total of 400 interviews were completed using a listing of system management personnel obtained from CableFile Research. Cable Poll™ researchers are 95 percent confident that the results are accurate within plus or minus 4.9 percentage points. ■

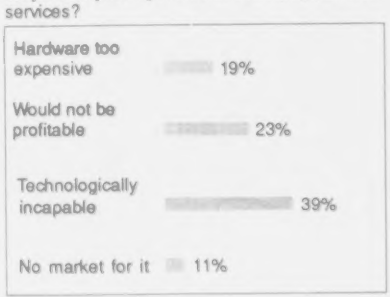
Does your system offer subscribers a pay-per-view service?



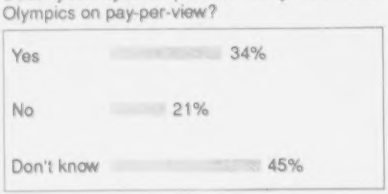
Would you say the financial return on your pay-per-view investment has been met, exceeded, or been below your expectations?



Why does your system not offer pay-per-view services?



Does your system plan to carry the 1992 Olympics on pay-per-view?



Top 100 MSO's

Rank		Multiple system operator	Basic subs	
	1	Tele-Communications Inc.	6,200,000	(4/89)
	2	American Television & Communications Corp.	4,100,000	(4/89)
(9)	3	TA Entertainment	2,642,729	(6/89)
(3)	4	Continental Cablevision	2,402,000	(5/89)
(4)	5	Warner Cable Communications	1,596,000	(6/89)
(5)	6	Storer Cable Communications	1,530,700	(1/89)
(6)	7	Cox Cable Communications	1,501,500	(4/89)
(7)	8	Comcast	1,463,000	(5/89)
(8)	9	Cablevision Systems	1,371,645	(6/89)
(11)	10	Jones Intercable/Spacelink	1,188,298	(5/89)
(12)	11	Newhouse Broadcasting	1,147,000	(5/89)
(13)	12	Heritage Communications	1,100,000	(4/89)
(14)	13	Times Mirror Cable TV	997,156	(1/89)
(15)	14	Viacom Cable	955,000	(4/89)
(16)	15	Cablevision Industries	929,000	(4/89)
(17)	16	Sammons Communications	884,000	(4/89)
(18)	17	Century Communications	800,000	(4/89)
(19)	18	Cooke Cablevision	750,800	(5/89)
(20)	19	Adelphia Communications	721,700	(5/89)
(21)	20	Paragon Communications	703,000	(1/89)
(22)	21	Falcon Cable TV	632,500	(3/89)
(23)	22	Gentel Cable	598,546	(5/89)
(24)	23	Telecable	580,000	(5/89)
(25)	24	KBLCOM	558,100	(4/89)
(26)	25	WestMarc Communications	561,878	(4/89)
(27)	26	Scripps-Howard	531,000	(3/89)
(28)	27	Multivision Cable TV	482,000	(4/89)
(29)	28	Tele-Media	466,328	(5/89)
(30)	29	Prime Cable	458,000	(6/89)
(31)	30	Post-Newsweek Cable	403,000	(4/89)
(32)	31	Lenfest Group	365,915	(5/89)
(34)	32	Maclean Hunter Cable TV	357,500	(5/89)
	33	TCA Group	349,300	(4/89)
(35)	34	Rifkin & Associates	324,000	(4/89)
(36)	35	Multimedia Cablevision	321,300	(4/89)
(37)	36	Colony Communications	312,000	(4/89)
(38)	37	TKR Cable	278,482	(5/89)
(39)	38	Triax Communications	277,500	(6/89)
	39	Western Communications	266,700	(4/89)
(41)	40	Cencom Cable	259,484	(6/89)
(40)	41	Star Cablevision Group	254,000	(1/89)
	42	Simmons Communications	246,668	(1/89)
	43	Hauser Communications	232,000	(5/89)
	44	Communications Service Inc.	228,526	(12/88)
	45	Service Electric Cable TV Inc.	211,500	(4/89)
	46	Greater Media	198,700	(3/89)
	47	Harron Communications	177,700	(3/89)
(50)	48	Sutton Capital	174,000	(6/89)
(48)	49	Columbia International	174,000	(4/89)
(49)	50	Media General	173,700	(5/89)
	51	Palmer Communications	160,551	(5/89)
	52	Insight Communications	157,700	(4/89)
	53	U.S. Cable Corp.	154,300	(3/89)
	54	Armstrong Utilities	151,800	(3/89)
	55	King Videocable	141,158	(1/89)
(57)	56	Northland Communications	137,148	(4/89)
(58)	57	Summit Communications	136,600	(3/89)
(59)	58	Bresnan Communications	127,351	(1/89)
(60)	59	Booth Communications	119,000	(1/89)
(61)	60	Sonic Communications	117,551	(5/89)
(62)	61	McDonald Group	115,200	(4/89)
(63)	62	Susquehanna Broadcasting	113,200	(2/89)
(64)	63	United Video Management	106,000	(3/89)
(65)	64	Pencor Services	100,400	(2/89)
(68)	65	First Carolina Communications	99,500	(3/89)
	66	Midcontinent Cable Systems Co.	95,550	(6/89)
(69)	67	WEHCO Video	93,900	(4/89)
(70)	68	Omega Communications	90,500	(3/88)
(73)	69	Gilbert Media	85,000	(6/89)
(71)	70	Coaxial Communications	80,000	(5/89)
(72)	71	Selkirk Communications	77,500	(3/89)
(74)	72	James Cable Partners	70,000	(4/89)
(75)	73	Douglas Communications	64,100	(3/89)
(76)	74	Barden Cablevision	62,700	(3/89)
(77)	75	Cardinal Communications	60,500	(6/89)
(78)	76	C-TEC Cable Systems	58,600	(5/89)
(80)	77	Hearst Communications Of California	58,200	(5/89)
(96)	78	Ranch Communications	58,000	(6/89)
	79	Prestige Cable TV Inc.	57,500	(3/89)
(84)	80	Telesat Cablevision Inc.	57,235	(6/89)
	81	State Cable TV	54,700	(5/89)
	82	Joseph Gans Cable TV	54,000	(12/88)
	83	Pagnotti Inc.	52,590	(12/88)
(85)	84	Bachow & Elkin Communications	51,700	(1/89)
(86)	85	Galaxy Cablevision	51,700	(3/89)
(87)	86	Leonard Communications	51,700	(12/88)
(88)	87	Helicon Corp.	50,000	(4/88)
(89)	88	New England Cablevision	49,000	(4/89)
(new)	89	Republic Communications Corp.	48,000	(5/89)
	90	Rock Associates	47,500	(3/89)
	91	Donrey Media Group	47,500	(3/89)
(new)	92	360 Corp.	45,000	(5/89)
(92)	93	CableSouth Inc.	42,100	(2/89)
(93)	94	CableAmerica	42,000	(2/89)
	95	Eastern Connecticut Cable TV	41,820	(6/89)
(94)	96	Cable Holdings Inc.	41,800	(3/89)
	97	Scton Corp.	40,400	(3/89)
	98	Star Cable Associates	40,000	(12/88)
	99	Fairbanks Communications	36,400	(3/89)
	100	ParCable	36,142	(5/89)

( ) **Rank last listing**

Subscriber counts are provided by MSOs and systems to Cable Vision. *Figures will be updated quarterly unless information is provided by MSOs or systems. Send updates to Cable Stats, 345 Park Avenue So., 9th Floor, New York, NY 10010.*

Top 100 Systems

Rank		Location	Operator	Basic subs	
	1	Long Island, NY	Cablevision Systems	472,225	(6/89)
	2	San Diego, CA	Cox Cable	401,765	(4/89)
	3	Orlando/Melbourne, FL	ATC	298,000	(2/89)
	4	San Antonio, TX	KBLCOM	234,835	(6/89)
	5	Manhattan, NY	ATC	231,864	(6/89)
	6	Phoenix, AZ	Times Mirror	220,968	(5/89)
	7	East Orange, NJ	Maclean Hunter	212,000	(6/89)
	8	Houston, TX	Warner	207,000	(6/89)
	9	Puget Sound, WA	Viacom	203,000	(6/88)
	10	Honolulu, HI	ATC	202,000	(1/89)
	11	Chicago (suburbs), IL	Continental	177,208	(2/89)
	12	Wayne, NJ	UA Entertainment	174,173	(6/89)
	13	Cincinnati, OH	Warner	167,000	(6/89)
	14	Rochester, NY	ATC	167,000	(1/89)
	15	Atlanta, GA	Prime Cable	166,329	(5/89)
	16	Cleveland, OH	Cablevision Systems	165,890	(6/89)
	17	Louisville/Jeff. Co., KY	Storer Communications	163,722	(5/88)
	18	Hampton Roads, VA	Cox Cable	162,964	(3/89)
	19	Cherry Hill, NJ	SYT	62,000	(1/89)
	20	Fairfax, VA	Media General	157,000	(11/88)
	21	Connecticut Complex	Cablevision Systems	156,000	(6/89)
	22	Jacksonville, FL	Continental Cablevision	154,600	(5/89)
	23	Hartford/Plainville/Vernon, CT	UA Entertainment	152,683	(6/89)
	24	Chicago, IL	TCI	148,857	(4/89)
	25	Memphis/W. Memphis, TN	ATC	148,000	(1/89)
	26	Kansas City, MO	ATC	147,000	(2/89)
	27	San Jose/Campbell, CA	Heritage	145,000	(6/89)
	28	Baltimore County, MD	Comcast	144,000	(6/89)
	29	Manhattan, NY	Paragon	143,500	(6/89)
	30	Tulsa, OK	UA Entertainment	140,015	(6/89)
	7	Denver (suburbs), CO	UA Entertainment	139,303	(6/89)
	32	Charlotte, NC	ATC	139,000	(1/89)
	33	Pompano, FL	Continental	136,793	(2/89)
	34	St. Louis, MO	Cencom	135,196	(6/89)
	35	Buffalo, NY	Adelphia Communications	132,801	(3/88)
	36	Brooklyn/Queens, NY	Warner	132,500	(6/89)
	37	San Diego, CA	ATC	132,000	(1/89)
	38	Martin/Stuart Co., FL	Gentel	129,460	(3/89)
	39	San Francisco, CA	Viacom	123,000	(6/88)
	40	Seattle, WA	TCI	120,518	(1/89)
	41	Austin, TX	ATC	120,000	(1/89)
	42	Warren, NJ	TKR	118,822	(6/89)
	43	Wilmington, DE	Heritage	112,000	(6/89)
	44	Grand Rapids, MI	UA Entertainment	111,198	(6/89)
	45	San Diego County, CA	Times Mirror	111,029	(5/89)
	46	Toledo, OH	Blade Communications	110,785	(5/89)
	47	Southeast Michigan	Comcast	110,000	(6/89)
	48	Chicago Suburbs, IL	Gentel	109,576	(5/89)
	49	Las Vegas, NV	Prime Cable	107,288	(5/89)
	50	Dallas, TX	Heritage	107,244	(6/89)
	51	San Juan, PR	Multivision Cable	106,450	(12/88)
	52	Jefferson Parish/Kenner, LA	Cox Cable	105,811	(3/89)
	53	Indianapolis, IN	Comcast	104,000	(6/89)
	54	Raleigh/Durham, NC	ATC	104,000	(1/89)
	55	Boston/Brookline, MA	Cablevision Systems	102,168	(6/89)
	56	Orange County, CA	Times Mirror	101,922	(5/89)
	57	Pinellas County, FL	Newhouse	100,614	(6/88)
	58	Hillsborough/Tampa, FL	Paragon	100,281	(2/89)
	59	Tacoma, WA	Viacom	99,000	(6/88)
	60	Chicago, IL	Group W	98,700	(5/89)
	61	Richmond, VA	Continental	97,935	(1/89)
	62	Jackson, MS	ATC	97,000	(1/89)
	63	Tucson, AZ	Cooke	96,976	(4/89)
	64	Pittsburgh, PA	TCI	96,712	(1/89)
	65	St. Petersburg, FL	Paragon	95,412	(2/89)
	66	Monmouth, NJ	Sutton Capital	94,970	(6/89)
	67	Dade/Broward County, FL	Storer	94,577	(5/88)
	68	Naples, FL	Palmer	94,450	(6/89)
	69	Reading, PA	ATC	94,000	(1/89)
	70	Worcester Complex, MA	Greater Media	92,148	(12/88)
	71	Milwaukee, WI	Warner	92,000	(6/89)
	72	Greensboro, NC	ATC	91,000	(1/89)
	73	Nashville, TN	Viacom	90,000	(6/88)
	74	Wichita, KS	Multimedia	87,351	(1/89)
	75	Columbus, OH	Warner	85,000	(6/89)
	76	Baton Rouge, LA	UA Entertainment	84,976	(6/89)
	77	Fresno, CA	Continental	84,217	(6/89)
	78	Akron, OH	Warner	84,000	(6/89)
	79	Albuquerque, NM	Jones Intercable	83,119	(5/89)
	80	Fayetteville, NC	ATC	83,000	(1/89)
	81	Dover/Morristown, NJ	Sammons	82,871	(5/88)
	82	South Bend, IN	Heritage	82,744	(6/89)
	83	Portland, OR	KBLCOM	82,587	(6/88)
	84	Harrisburg, PA	Sammons	82,334	(5/88)
	85	Houston Suburbs, TX	Prime Cable	82,000	(6/89)
	86	Medford Complex - Boston Suburbs, MA	Warner	82,000	(6/89)
	87	Orange County, CA	KBLCOM	81,604	(1/89)
	88	Oakland County, MI	UA Entertainment	80,564	(5/88)
	89	Indianapolis, IN	ATC	80,000	(1/89)
	90	Independence, MO	Jones	79,897	(11/88)
	91	Providence/Warwick, RI	Times Mirror	78,528	(6/89)
	92	New Orleans, LA	Cox Cable	78,493	(3/89)
	93	Allentown, PA	Service Electric	78,000	(12/88)
	94	Oklahoma City, OK	Cox Cable	77,014	(3/89)
	95	South Texas, TX	Heritage	75,560	(6/89)
	96	Omaha, NE	Cox Cable	74,472	(3/89)
	97	Little Rock, AR	Storer	74,274	(6/89)
	98	Pleasant Hill, CA	WestMarc	74,268	(5/89)
	99	Birmingham, AL	ATC	73,500	(5/89)
	100	Flint, MI	Comcast	73,000	(6/89)